

TOPIC 1: INTRODUCTION TO TIME AND LEAVE

Accurate time and leave entry in the SAM II HR/Payroll System is critical because it determines the accuracy of the employee paychecks generated by the pay process. Time and leave events are entered in the system using documents and document generation windows. This course is designed to review the processes involved with time and leave maintenance.

At the end of this topic, you will be able to:

- Describe the Time and Leave process
- Describe the functions of the documents used for time and leave entry

TIME AND LEAVE FLOW CHART

TIMEKEEPING DOCUMENTS



Did you know?

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TIME AND LEAVE

The SAM II HR/Payroll System records both payroll and leave data for employees of the State of Missouri.

Leave accounting and time and attendance maintenance are handled through the on-line recording of pay and leave events in the SAM II HR/Payroll System. The type of the agency's business, the Fair Labor Standards Act (FLSA) exemption status of the employee and the continuing or temporary nature of the job decide what type of event should be used in recording time and leave. Parameters are established in the system to associate employees whose circumstances are the same. These parameters referred to in the SAM II HR/Payroll System as policies or profiles, ensure that the appropriate uses of pay and leave events are established in the system. A pay and leave policy as well as an FLSA profile is tied to each employee through the sub-title specified on the Position Status Maintenance (PSMT) window.

The SAM II HR/Payroll System tracks time and leave information for both exception-paid (salaried) and positive-paid (hourly) employees. Whether an employee is exception-paid or positive-paid is determined at the position level by specifying the appropriate pay class code on the Position Status Maintenance (PSMT) window. The Pay Class (PYCL) table contains a field that indicates if employees in a specific pay class should be exception-paid or positive-paid.

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In addition to entering time online in the SAM II HR/Payroll System, another possible method to enter time and leave data is through interfaces with agency timekeeping systems. These interfaces could be a local timekeeping system that currently exists or a system that was once developed or purchased by some agencies. If your agency keeps its own timekeeping system, you will use your agency-specific system to enter time and leave information. The interface will “convert” this information into data that is usable by the SAM II HR/Payroll System. However, all corrections to errors on a timesheet must be entered online in the SAM II HR/Payroll System. Corrections can not be made in your local timekeeping system. In addition, manual adjustments to leave accruals and/or balances must be entered on-line in the SAM II HR/Payroll System.

The topics in this course explains the following:

- How to enter and correct time for a positive-paid employee
- How to enter and correct leave and additional hours for an exception-paid employee
- How to request and adjust leave
- How to enter special leave related pay events like federal and state compensatory time
- How to override an employee’s accounting distribution
- How to liquidate leave at termination or payoff compensatory time
- How to generate group timesheets
- How to generate individual timesheets

How to look up leave information on inquiry windows

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TIME AND LEAVE

Timekeeping Documents

Entry of timekeeping events is accomplished through various documents and document generation windows, which are used to record events specific to an employee's accounting, pay and leave information.

- **CURRENT PERIOD TIMESHEET (CPER)** – records time worked and leave taken during the current pay period for an individual employee.
- **CURRENT PERIOD CREW TIMESHEET (CREW)** – records time worked and leave taken during the current pay period for a crew of employees who belong to the same pay location.
- **CURRENT PERIOD INDIVIDUAL TIMESHEET (CITS)** – records time worked and leave taken during the current pay period at the employee level.
- **PRIOR PERIOD TIMESHEET (PPER)** – allows timekeepers to record or adjust time worked and leave taken for a prior pay period.
- **LEAVE ACCRUAL (LEAV)** – allows timekeepers to manually accrue leave for an employee.
- **EMPLOYEE LEAVE REQUEST (LREQ)** – allows employees to submit a request for leave.

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Reference Tables

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- **EVENT CATEGORY (CATG)** – This table defines and identifies the types of categories including pay, deduction, and leave events. This window defines how events are summarized and stored on the employee's records, how the leave category balances are calculated (i.e., year-to-date, inception-to-date, etc.), and how the leave category amounts are defined (i.e., hourly, daily, etc.).
- **EVENT TYPE (EVNT)** – This table defines and identifies pay and leave events that are available in each event category, such as regular pay and leave without pay.
- **LEAVE POLICY (LPOL)** – This table determines the type of leave for which an employee is eligible and also groups employees that share the same rules for leave.
- **LEAVE POLICY TYPE (LPET)** – This table links a leave policy to specific leave events. A leave event must be linked to an employee's policy in order for the employee to use or accrue with a particular leave event.
- **LEAVE RATE (LPRT)** – This table is used to define the guaranteed minimum leave accrual, the minimum number of hours required for accrual, the standard number of hours required and the standard accrual rate for each leave type.
- **LEAVE PROGRESSION RULE (LPRL)** – This table is used to track the various, progressively increasing leave accrual rates of employees.
- **LEAVE CATEGORY (LPCT)** - The Leave Category (LPCT) window is used to identify what values, already identified on Event Category (CATG), belong to each of the values identified as Leave Policies on LPOL.
- **PAY POLICY (PPOL)** - The Pay Policy (PPOL) window defines the codes which describe valid pay policies applicable each pay period.
- **PAY EVENT TYPE (PPET)** - The Pay Event Type (PPET) window defines whether or not a pay event is valid for a specified pay policy and how pay for the event is calculated.

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Time and Leave Inquiries

Inquiries are on-line windows that provide information in a compiled format that facilitate review and decision-making. They are updated “real time” which means as soon as a document has received the final level of approval. The time and leave inquiries are:

- **EMPLOYEE LEAVE BALANCE INQUIRY (QLBL)** – This inquiry displays all of an employee’s leave balances by leave category, category description, balance, amount basis (hours, days, weeks, etc.) of the balance, balance type (year-to-date, leave year-to-date, inception-to-date, etc.) and the number of the month the leave year ends.
- **LEAVE ACCRUAL AND USAGE BY MONTH INQUIRY (QLAU)** – This inquiry displays a summary of an employee’s particular leave category, current balance, accruals, and usage by month for the year selected. As on other leave inquiry windows, this window displays the category’s amount basis, balance type, and year-end month.
- **EMPLOYEE LEAVE ACTIVITY INQUIRY (QLDT)** – This inquiry provides detailed leave activity for each leave event within a specified leave category. It displays a description of the leave category, the amount basis, the leave year-end month, and a detailed activity for each leave event. It also identifies the document on which the leave event was submitted and the date it was processed.
- **TIMESHEET ROSTER (QTRS)** – This inquiry displays employee current period and prior period timesheets for a given pay location and given pay period. Views may be based on a combination of the pay location and the pay period end date and/or employee name.
- **LEAVE REQUEST BY EMPLOYEE INQUIRY (QLRQ)** – This inquiry displays all the leave requests an employee has requested for a given period of time by leave category.
- **HOURS BY PAY LOCATION INQUIRY (QHPL)** – This inquiry displays all the employees of a specific pay location and their time and attendance data for a specific day.

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- **HOURS BY EMPLOYEE INQUIRY (QHRE)** – This inquiry displays time and attendance data entered for an employee for a specific date.
- **HOURS SUMMARY BY PAY LOCATION INQUIRY (QHPS)** – This inquiry displays all the employees and their hour summaries within a given pay location for a specific date range.
- **WORK SCHEDULE BY PAY LOCATION INQUIRY (QSCH)** – This inquiry displays all the employees' schedules within the specified pay location for a given week.

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Entering & Correcting Time for Positive Pay

Positive-paid employees are paid only for the hours of work and leave that are submitted through on-line timesheets for a particular pay period. If an on-line timesheet is not submitted, the employee is not paid. If the hours entered for a particular event(s) for a positive-paid employee should be charged to an accounting distribution different from what has already been specified in the system for the employee, that override must be submitted through the on-line timesheet as well.

Entering & Correcting Leave and Additional Hours for Exception Pay

For exception-paid employees, agencies are not required to enter a timesheet in order for the employee to be paid. Exception-paid employees are paid for a standard number of hours worked for each pay period. An agency must submit timesheets only when there is an exception to the hours normally worked/paid for exception-paid employees. These exceptions fall into three categories: leave usage, hours worked over the employee's normal hours, or leave/pay events that should be charged to an accounting distribution different from what has already been specified in the system for the employee.

Requesting and Adjusting Leave

Like leave accounting and time and attendance in the SAM II HR/Payroll System, accruing, requesting and adjusting leave will occur on-line. The Automated Accrual Document (AACC) is created when leave is accrued automatically during each pay cycle. If a policy and leave event is not set up for an employee to accrue leave automatically, leave accrual must be manually entered. The Leave Accrual (LEAV) document is used to manually accrue leave for employees.

The Employee Leave Request (LREQ) document will allow an employee to request leave on-line. It may be used at the agency's discretion. Agencies may use their own forms and procedures for internal processing of leave requests. The LREQ will automatically generate leave events **only** on Current Period Individual Timesheets (CITS) and Current Period Crew Timesheets (CREW).

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Leave Related Pay Events

Leave “accounts” have been established in the SAM II HR/Payroll System to accommodate several types of leave events. The most common types of leave events are Sick Leave and Annual Leave. However, there are other special leave related pay events associated with leave “accounts” including Federal Compensatory Time, State Compensatory Time, Holiday Compensatory Time, ShareLeave and Workers Compensation.

The State of Missouri complies with the Fair Labor Standards Act (FLSA). Employees eligible for FLSA are referred to as “Non-exempt Employees”. If an employee is eligible for federal compensatory time, the system will automatically calculate the eligible hours at the time and one-half rate and place the time earned in the federal compensatory leave balance. Employees who are not eligible for FLSA are referred to as “Exempt Employees”. If an employee is not eligible for federal compensatory time, the leave will be calculated at the non-federal rate of straight time and placed in the state compensatory leave balance.

In addition, the State of Missouri has established an 86.667 hour standard for pay period hours. This will ensure that a consistent amount is paid to exception-paid employees for each pay period and a consistent hourly rate is calculated to apply to time and leave entered onto system timesheets based on the total working hours in a year (2080 hours). However, there are circumstances where the fluctuation between standard and actual hours will impact pay for leave processing. We will discuss these situations later in this course.

Flexible Time Usage

Exception-paid employees may utilize “flex time” - working additional hours one day, then working fewer hours on another day. An employee's work hours must match their regular work schedule. These events need to be recorded differently based on the FLSA and pay period cycles, as well as the status of the employee's existing comp time balances.

Accounting Overrides

Accounting overrides are entered into the system for a particular pay or leave event using the Overrides View of the CPER, CREW, CITS, or PPER, depending on the pay period. Accounting overrides are to modify or change the labor distribution profile or accounting attributes by pay or leave event specified on the timesheet document.

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Leave Liquidation

When an employee leaves your agency (resignation, transfer, etc.) with a positive accrued leave balance, it is possible to pay the employee for that leave in addition to their regular or base pay. The same is true paying off compensatory time. This is accomplished using the CPER, CITS, or PPER, depending on the pay period.

Generating Group Timesheets

The system provides functionality for entering and viewing time and attendance data at a group level (Pay Location) as well as an individual employee level. All of the time and leave data and associated accounting information for all employees at one pay location may be entered on a daily basis into the system using the Current Period Crew Timesheet Document Generation (CRGN) window which will generate a Current Period Crew Timesheet (CREW) document from the user-specified data. The CREW document contains a line for each employee in the same pay location for the specified event date. Specific information on each employee will be entered on the generated CREW document.

Generating Individual Timesheets

The Current Period Individual Timesheet Document Generation (CTGN) window will generate the Current Period Individual Timesheet (CITS) document from user specified data. This generation process makes time and attendance data entry tasks easier by automatically creating document lines on the CITS. The generated CITS document can also include lines from approved leave requests, if the agency chooses to use this feature.

Multiple Appointment Timekeeping

In the State of Missouri, an employee's primary appointment defines the EEO and FLSA data for that employee. If an employee with multiple appointments is eligible for Federal and/or State Compensatory Time, all eligible hours will need to be calculated by each agency for the position they have assigned to the employee and the eligible hours accrued manually.



NOTES